



# Acquisition Planning Considerations

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# Agenda

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- What is acquisition planning?
- Why should I be concerned about it?
- What should written acquisition plans contain?
- Where can I get further information?
- How is market research important?
- Closing



# What Acquisition Planning is Not

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- ***“We plan to acquire the mission critical \$25 million AGRI-MATIC system off the GSA schedule.”***
- **There’s nothing wrong with using existing ID/IQ contracts, MACs, GWACs. But more thought and research needs to go into the acquisition planning than this....**
- **GAO critical of schedule, MAC and GWAC misuse to avoid competition, etc.**



# What is Acquisition Planning?

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- The process by which the efforts of all personnel responsible for an acquisition are coordinated and integrated through a comprehensive plan for fulfilling the agency need in a timely manner and at a reasonable cost. It includes developing and overall strategy for managing the acquisition. (FAR 7.101)



# What is Acquisition Planning?

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Agencies shall perform acquisition planning and conduct market research (FAR part 10) for all acquisitions in order to promote and provide for:

- Acquisition of commercial items
- Full & open competition

Acquisition planning is documented in a written plan.



# What is Acquisition Planning

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## **OMB Requirements:**

- **Single or several contracts (“useful segments”)?**
- **Contract types(s)/risk mitigation?**
- **Financial incentives?**
- **Performance based statement of work?**
- **Effective use of competition?**
- **Market research results?**
- **COTS or custom built? Combo?**
- **Full Funding?**



# Why Should I be Concerned About it?

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- Helps to increase odds of project success – 90% of cost, schedule performance goal issue
- Required by OMB – 300 question asking if Senior Procurement Executive reviewed acquisition strategy; new investment unlikely to be approved without it
- Required by FAR
- Required by USDA policy



# Content of Written Plans

(Not an Exhaustive List)

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- Decision milestones
- Acquisition background and objectives
  - Statement of need
  - Applicable conditions
  - Cost (life cycle, design-to-cost, should cost, etc.)

Capability or performance

Delivery or performance period requirements



# Content of Written Plans

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- **Trade-offs**
- **Risks**
- **Acquisition Streamlining**
- **Actions to encourage industry participation (pre-solicitation conferences/advisory multi-step process, draft solicitations, etc.)**
- **Identification of Potential Sources (Include: small business, service-disabled veteran-owned, JWOD, HUBZone, etc.)**
- **Competition**



# Content of Written Plans

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- Identify major systems/components; address component breakout
- Outline source selection procedure
- Address contract issues (approach, lease/buy, etc.)
- Budget & funding
- Product or service descriptions



# Content of Written Plans

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- Contractor versus Gov't performance
- Make or buy
- Management information requirements
- Test and evaluation



# Other Acquisition Plan Issues

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- Gov't furnished property and information (GFP/GFI)
- Environmental and energy conservation objectives – Administration priority
- Security considerations
- Contract administration
- Milestones
- Bundling issues



# Market Research

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- **FAR part 10**
- **Expanded role from past practice**
- **Before developing new requirements**
- **Before soliciting offers in excess of the simplified acquisition threshold**
- **Use to determine if sources available, extent of commercial items available, that meet agency requirements**
- **Determine the practices of firms producing, distributing, and supporting commercial items, such as: licensing, financing, etc.**



# For More Information....

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- FAR parts 7, 10 and 15
- Your servicing contracting office
- Other program managers
- The Internet (589,000 “hits” using Hot Bot search engine – some better than others)
- Training Courses
- Contractors – but beware organizational conflicts of interest



# Questions?

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- Thanks for your time and attention